

With the enactment of NOAA's FY2005 Appropriation, new program codes and projects have been created that may affect your funding distributions already in place. To aid in adjusting your existing BOP(s) so that the NOAA Budget Office can reduce or modify the current allotments, an instruction sheet has been created by the National Weather Service staff and is forwarded for your use. Follow the questions listed below to determine which BOP guidance to use to reduce/delete existing BOP(s).

What is happening to the current active Program/Project Account?

Is the active Program/Project Account being completely replaced by a new Program/Project Account?

If **YES**,

Do obligations exist against the active Program/Project Account?

If **YES**, follow the instructions "Adjusting BOPs in 2, 3 and 4th QTRs" beginning on Page 2.

If **NO**, follow the instructions "Adjusting BOPs in all QTRs" beginning on Page 5.

If **NO**,

Is the active Program/Project Account funded in FY 05?

If **YES**, await further guidance, from your LO, for making changes to plan amounts.

If **NO**, follow instructions "Adjusting BOPs in all QTRs" beginning on Page 5.

“Adjusting BOPs in 2, 3 and 4th QTRs”

1. Log on to the Budget Operating Plans system.
2. Navigate to the Budget Operating Plan Transaction Screen (FM066).
3. Complete the bureau code (14); fund code (FC 31 for ORF, FC 32 or 34 for PAC); fiscal year (05) blocks.
4. Click on the Notes icon. Input note: “Adjustment of 2, 3, 4th QTR”
5. Place a Check in the Change field.
6. The Code field should be “ADJUST.”
7. Enter the initial plan number of the BOP being adjusted in the No field.
8. Ensure that a Check Mark is in the Populate Detail field.
9. Note that a negative figure should be in the Trans Amount Total field. This figure will be the original plan total.
10. Click on the Save icon. This will save the plan and automatically generate a new sequential plan number.

The screenshot shows the 'Budget Operating Plan Transaction Screen (FM066 VER-2.1.0.6)' with the following fields and callouts:

- Step 10:** Points to the 'Save' icon in the top toolbar.
- Step 3:** Points to the 'Bureau Code' (14), 'Fund Code' (31), and 'Fiscal Year' (05) fields.
- Step 4:** Points to the 'Notes' icon in the top toolbar.
- Step 5:** Points to the 'Change' checkbox in the 'Plan' section.
- Step 6:** Points to the 'Code' field (ADJUST).
- Step 7:** Points to the 'No' field (841).
- Step 8:** Points to the 'Populate Detail' checkbox.
- Step 9:** Points to the 'Trans Amount Total' field (-21,697,525).

The form includes sections for 'Budget Control', 'Budget Detail', 'Summary By Details', and 'Summary By Objects'. The 'Plan' section contains fields for 'Change', 'Code', 'No', 'Template Code', 'Corresponding Orgs', and 'Populate Detail'. The 'Trans Amount' section shows a table with columns for 'Total', '1st Qtr', '2nd Qtr', '3rd Qtr', and '4th Qtr'. The 'Total' row shows a value of -21,697,525.

“Adjusting BOPs in 2, 3 and 4th QTRs” (Continued)

11. Click on the Budget Detail tab.
12. Click on the desired line to be deleted, the yellow diamond indicates the selected data line. Then click on the Delete a Record icon. Note that as each Budget Detail line is deleted the Totals change to reflect the deletion. Delete each line of the Budget Detail that has an Effective Date during the 1st QTR (any date between 01-OCT-2004 and 31-DEC-2004).
13. Once all 1st QTR Budget Detail lines have been deleted, note the new Totals for Amount and (FTE) Qty.

Step 11

Step 12

Step 13

Effective Date	BM	D	Percent	Amount	Unit	Qty	S Code	S Rate	Object Class	Pool
01-OCT-2004	01	A	1.130	-245,076	FTE	.00			12 10 00 00	>
01-OCT-2004	01	A	0.019	-4,057	FTE	.00			12 00 00 00	>
01-OCT-2004	01	A	0.001	-193	FTE	.00			21 00 00 00	>
01-OCT-2004	01	A	0.007	-1,415	FTE	.00			22 00 00 00	>
01-OCT-2004	01	A	0.758	-164,477	FTE	.00			23 00 00 00	>
01-OCT-2004	01	A	0.002	-538	FTE	.00			25 00 00 00	>
01-OCT-2004	01	A	0.000	-8	FTE	.00			26 00 00 00	>
01-OCT-2004	01	A	0.000	-	FTE	.00			31 00 00 00	>
Totals:				100.010	-21,697,525	-159.17				

	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Total
Transaction:					-21,697,525
Cumulative:	-4,303,091	-5,676,512	-5,971,914	-5,746,008	-21,697,525

Begin Date: 01-OCT-2004 End Date: 30-SEP-2005 Pool Balance: -245,076

Object Descr: PERS BENEFITS TO OTHER FUND EC SURCHARGE

“Adjusting BOPs in 2, 3 and 4th QTRs” (Continued)

14. Click on the Budget Control tab.
15. Verify that the new FTE and Trans Amount Total reflect the figures noted in step 13; change if necessary to match the Budget Detail Totals.
16. Click on Requester Approval.
17. Inform the next level approver that the BOP(s) is/are awaiting their approval.

Step 14

U.S. DEPARTMENT OF COMMERCE (OPSS\$HEFOS01@CFSFX.WORLD - Oracle Forms V6)

Action Edit Query Block Record Field Window Help

Budget Operating Plan Transaction Screen (FM066 VER-2.1.0.6)

Budget Control Budget Detail Summary By Details Summary By Objects

Bureau Code 14 Name NOAA Trans No 23498
Fund Code 31 Title ORF (05/06) Internal
Fiscal Year 05 Appropriation Symbol 1305061450 Report Notes

Plan
☒ Change Code ADJUST No 841 - 1 ☐ Populate Detail
Template Code NONE Corresponding Orgs 00 00 0000 00 00 00 00

D/R Flag D Category B1 Item No 004 Reimb Agreement No
Project Task Program Organization UDF
ACCS 0000000 000 04 04 01 005 20 01 0000 00 00 00 00 000000
Unit FTE Qty -119.36 Distribution Not Applicable ☐ Surchage Codes

Trans Amount
Total 1st Qtr 2nd Qtr 3rd Qtr 4th Qtr
-17,394,434

☐ Requester Approval By Date
☐ Document Approval Approval Routing Apply Surchage

Step 16

Step 15

“Adjusting BOPs in ALL QTRs”

1. Log on to the Budget Operating Plans system.
2. Navigate to the Budget Operating Plan Transaction Screen (FM066).
3. Complete the bureau code (14); fund code (FC 31 for ORF, FC 32 or 34 for PAC); fiscal year (05) blocks.
4. Click on the Notes icon. Input note: “Deletion of original BOP amount”
5. Place a Check in the Change field.
6. The Code field should be “ADJUST.”
7. Enter the initial plan number of the BOP being adjusted in the No field.
8. Ensure that a Check Mark is in the Populate Detail field.
9. Note that a negative figure should be in the Trans Amount Total field. This figure will be the original plan total.
10. Click on the Save icon. This will save the plan and automatically generate a new sequential plan number.

The screenshot shows the 'Budget Operating Plan Transaction Screen (FM066 VER 2.1.0.6)' from the U.S. Department of Commerce. The interface includes a menu bar (Action, Edit, Query, Block, Record, Field, Window, Help) and a toolbar with various icons. The main form is divided into several sections:

- Budget Control:** Includes tabs for Budget Detail, Summary By Details, and Summary By Objects.
- Header Section:** Contains fields for Bureau Code (14), Name (NOAA), Fund Code (31), Title (ORF (05/06)), Fiscal Year (05), and Appropriation Symbol (1305061450). There are also buttons for Report and Notes.
- Plan Section:** Includes a checked 'Change' checkbox, Code (ADJUST), No (841), and a checked 'Populate Detail' checkbox. There is also a 'Template Code' field set to NONE.
- Details Section:** Includes fields for D/R Flag (D), Category (BT), Item No (004), Reimb Agreement No, Project, Task, Program, Organization, UDF, ACCS, Unit (FTE), and Qty (-159.17). There is also a 'Distribution' dropdown set to 'Not Applicable'.
- Trans Amount Section:** A table showing the total and quarterly amounts. The total is -21,697,525.
- Approval Section:** Includes checkboxes for 'Requester Approval' and 'Document Approval', a 'By' field, a 'Date' field, and buttons for 'Approval Routing' and 'Apply Surcharge'.

Callouts from numbered boxes point to specific fields and actions:

- Step 3:** Points to the Bureau Code (14) and Fund Code (31) fields.
- Step 4:** Points to the Notes icon in the toolbar.
- Step 5:** Points to the 'Change' checkbox.
- Step 6:** Points to the 'Code' field (ADJUST).
- Step 7:** Points to the 'No' field (841).
- Step 8:** Points to the 'Populate Detail' checkbox.
- Step 9:** Points to the 'Trans Amount Total' field.
- Step 10:** Points to the 'Save' icon in the toolbar.
- Step 11:** Points to the 'Requester Approval' checkbox.

11. Click on Requester Approval.
12. Inform the next level approver that the BOP(s) is/are awaiting their approval.